

Chapter XIV: Reports

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Reports Overview

There are a number of reports available through CRIS. There are two basic types of reports:

- those that are printed on demand and
- those that are printed automatically at either scheduled times of the day or as the result of specific actions taking place within CRIS

Select a Report to Print

All CRIS users with applicable security may print reports from CRIS. Report availability is controlled through security related to one's job functions. Determine the report category, the tab to select, and the appropriate filters (if applicable). The following provides steps for selecting a report to print.

Report Category

Determine the report category before you begin. Report Categories include Patient List, Orders, Results and Document reports.

Patient List Reports

- Are accessed properly only when the **Patient List tab** is selected.
- Display lists of patients by unit, by Institute, or by religion.
CAUTION: If you are not careful, you can print against the entire Clinical Center which may affect system resources in both processing time and printing. Therefore, it is extremely important that you request only the desired list of patients by selecting appropriate parameters from the **Options** button. (See page [5](#))

Orders Reports

- Are accessed properly only when the **Orders tab** is selected.
- Display a list of orders for current patients.
- Display orders based on the current filter settings that are set from the orders tab e.g. filtered by dates, status, order selection, or display format. (See page [3](#) for where to set filters).

Results Reports

- Are accessed properly only when the **Result tab** is selected.
- Display results based on the current filter settings.
CAUTION: Result reports can be quite long. Please attempt to define filter settings (use filters on the **Results tab**) to avoid printing unnecessary data.

Documents Reports

- Are accessed properly only when the **Documents tab** is selected.
- Will display clinical documentation based on current filter settings from the **Documents tab**.

CAUTION: Document reports can very easily become extremely long. Please attempt to filter and print only the data that you need.

Administration (Admin) Reports

- Not all Admin reports require that you have a specific tab selected.
- However, there are some Admin reports (labels) that must have the **Documents tab** selected in order to print. These are the reports with **"(Documents tab)"** listed in their title.

Nursing Reports

- Do not require that you have a specific tab selected.
- However, there are some Nursing reports that must have a specific tab selected in order to print. These reports have the tab indicated in parenthesis after the report title

Medical Records Reports

- Medical Records reports (MRD) are used for the patient's hard copy medical record.
- MRD reports are accessible primarily by Medical Records staff.

Chart Tabs

Some reports are only found when you select the corresponding chart tab. See the Report Categories descriptions above for details on where to find specific reports.

Select the **Patient List tab** for **Patient List** reports

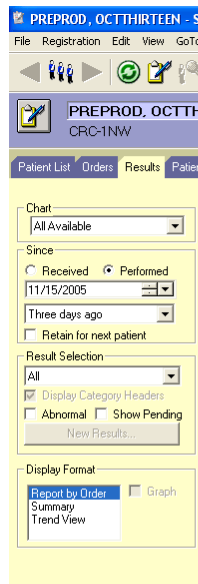
Select the **Orders tab** for **Orders** reports

Select the **Results tab** for **Results** reports

Select the **Documents tab** for **Documents** reports

Filters

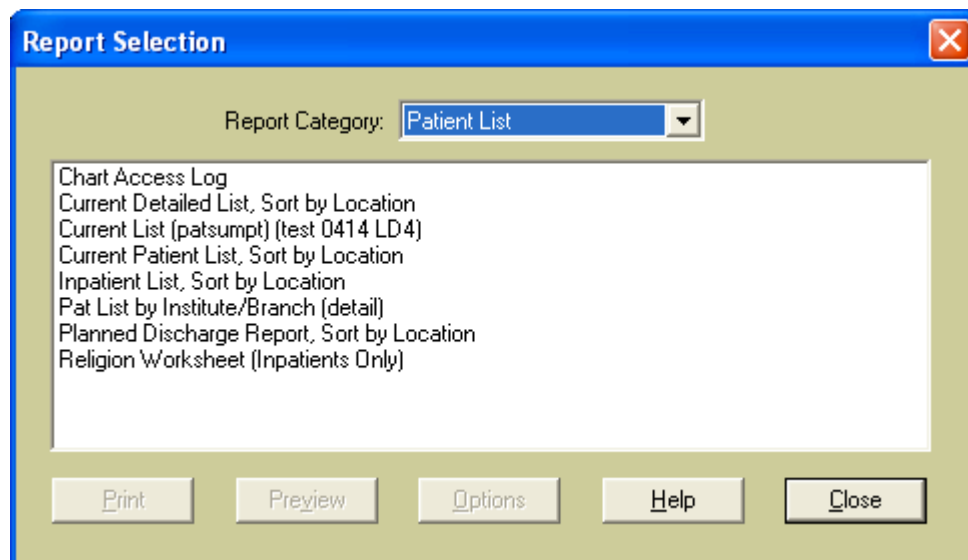
Once you have selected the desired tab, apply the desired filter settings to display only the data you wish to include in your report. Many CRIS reports will contain only the data that the filter settings display (i.e. they are "context sensitive"). The filters will vary based on which chart tab you select.



Screen 14.1: Result Tab Filters

Report Selection

Once your filters have been set, the next step is to access the **Report Selection** dialog box. Select the printer icon found on the menu bar or select **File** and **Print Reports**. The **Report Selection** dialog box opens and will display a list of reports



Screen 14.2: Report Selection Dialog Box

The report category available will reflect the tab that has been selected. From the list of available reports that displays, select the desired report.

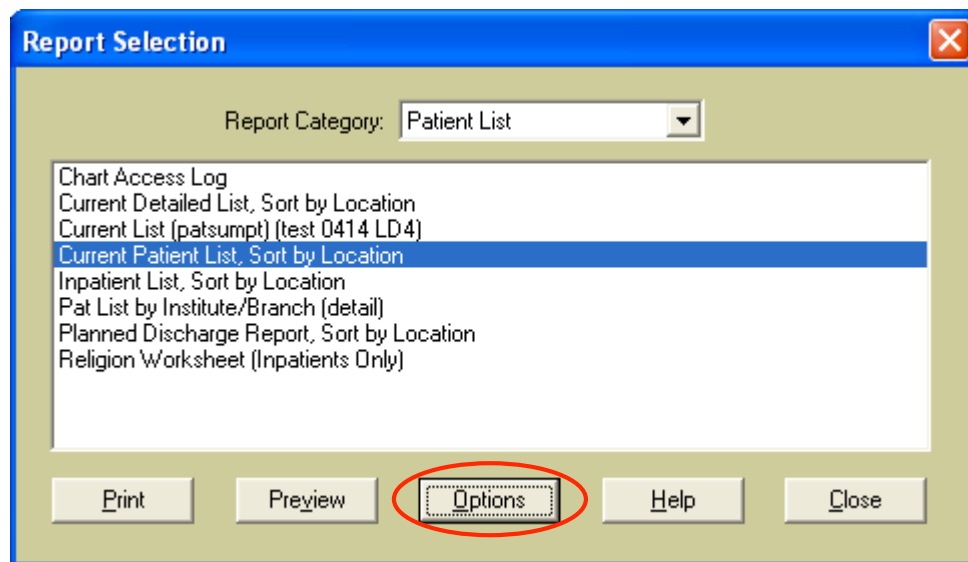
Print Reports

Enter the Report Submission Information

When previewing or printing some reports, you must choose the following parameters:

- What the report contents will include (Parameters tab)
- Where it will print (Distribution tab)

To display these parameters select **Options** from the Report Selection dialog box



Screen 14.3: Report Selection Dialogue Box

The Parameters Tab

Selecting the parameters help refine the report date so you have only the data you need. Report parameters may include dates, visit types, locations, care providers, roles or allergies. The parameters vary for each report. Instructions are provided when necessary.

The screenshot shows a window titled "Report Submission Information" with a blue header bar. Below the header are two tabs: "Parameters" (which is selected and circled in red) and "Distribution". The "Parameters" tab contains the following fields:

- Report Name:** A text box containing "D-NIH_Std_PatDtILC".
- Instructions:** A large, empty text area.
- Selection Criteria:** A section containing three items:
 - Print Primary Provider:*** A checkbox that is checked.
 - Patient Comment Type:** A list box with options: "<ALL>", "<NONE>" (highlighted in blue), "Citizen", and "Deceased".
 - Chart Comment Type:** A list box with options: "<ALL>", "<NONE>" (highlighted in blue), "Adv. Directives", and "Care Provider".

At the bottom of the dialog are four buttons: "Print", "Preview", "Cancel", and "Help".

Screen 14.4: Parameters Tab

The Distribution Tab

The **Distribution Tab** is used to identify the print location for the report. This may be automatically set depending on the type of workstation you are printing from.

Print from a Standard Clinical Desktop

- Select the **Distribution tab**
- On Standard Clinical Desktop machines, you may simply accept the default **Primary Report Printer**. This is the main printer for patient care unit computers. Please be aware that printing excessively large documents to this printer may interfere with patient care activities.

Report Submission Information

Parameters Distribution

Print Policy

☐ Patient Location

☒ Assigned

☐ Current

☐ Both

☒ Workstation Location

☐ Broadcast Print

☐ Physical Printer

☐ Default Desktop Printer

Primary Report Printer

Copies: 1

Priority: Normal

Target Database: Current Active

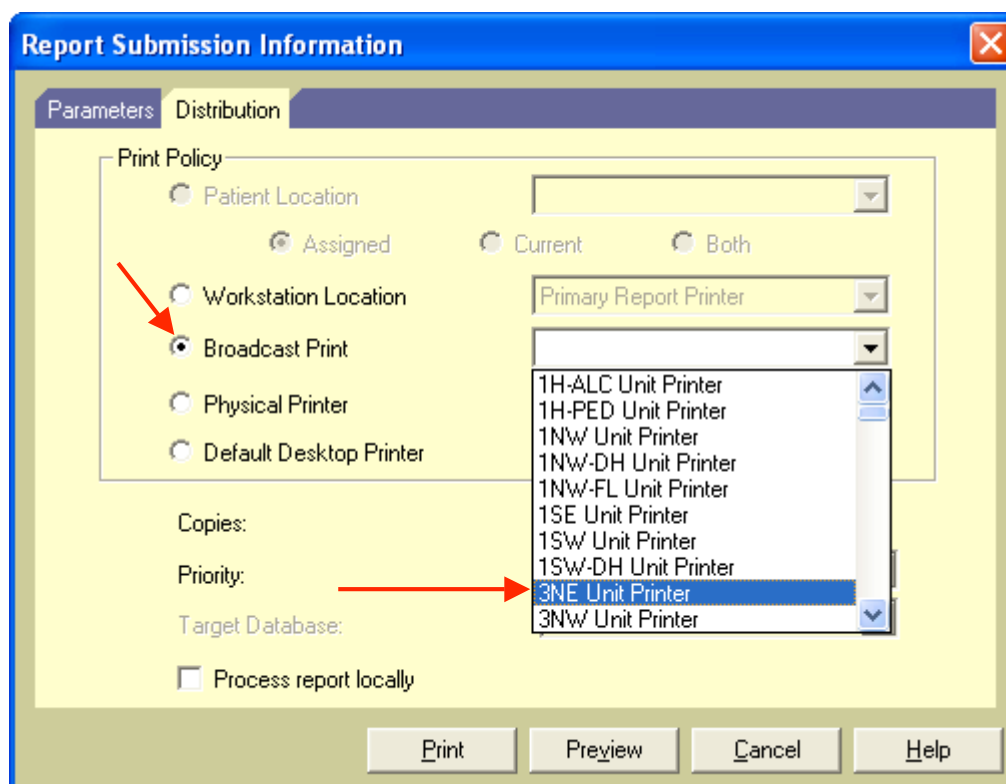
☐ Process report locally

Print Preview Cancel Help

Screen 14.5: Distribution Tab, Primary Report Printer

Print from SunRays, MACs and Workstations in Offices

- Select the **Distribution Tab**
- Click the **Broadcast Print** option and then select a printer from the dropdown box to its right. **Note:** All patient care units and many other areas have their printers displayed in the dropdown. Select the appropriate printer to print.

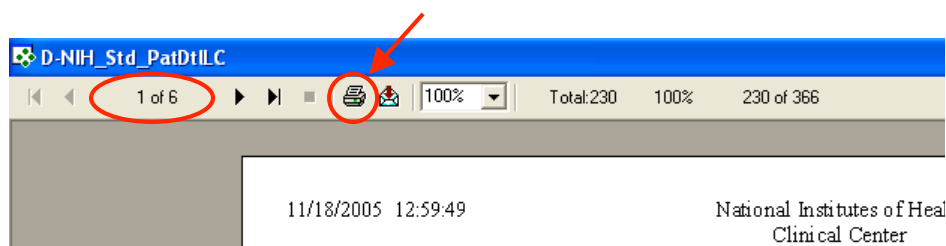


Screen 14.6: Distribution Tab, Broadcast Print

Preview a Report

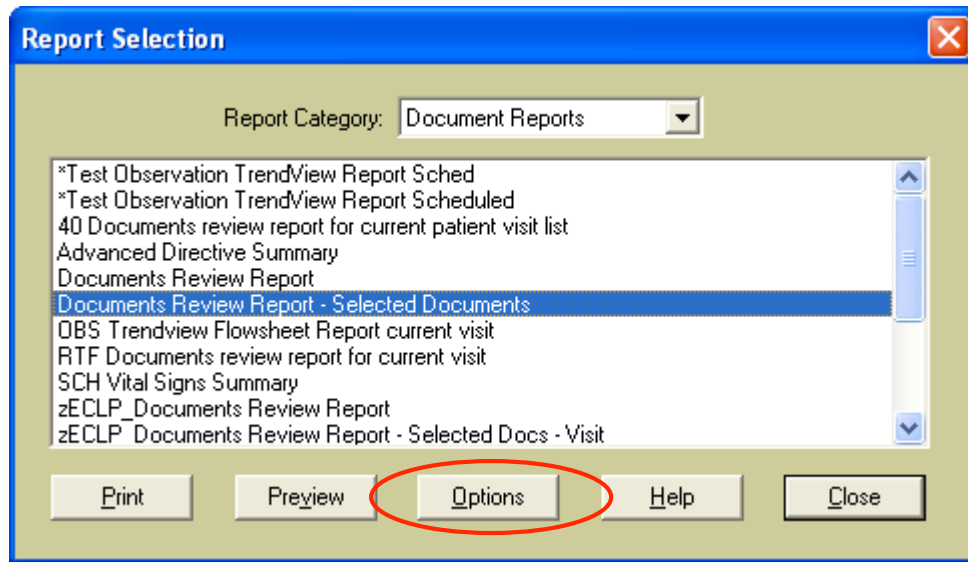
Once the appropriate printer has been selected you can select the **Preview** button. Previewing the report on screen prior to printing will ensure that the correct data has been captured. If the report is too long or some of the data is unnecessary, the print job may then be modified prior to printing.

In the **Preview** mode, you are able to see how many pages the report will be when printed to hard copy. Once you have selected **Preview** and are satisfied with the on-line report, select the printer icon on the menu bar for the print dialogue box.



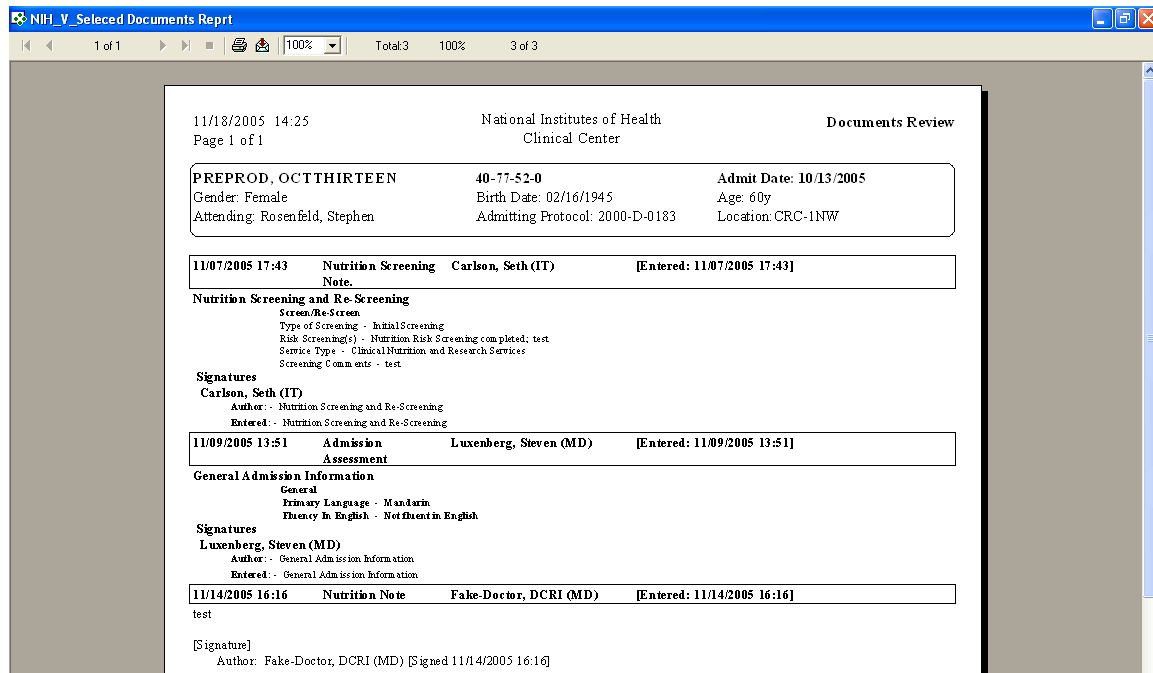
Screen 14.7: Print Preview

- From the **Report Selection** dialog box, select **Documents Review Report – Selected Documents**.



14.10: Report Selection Dialog Box

- Use the **Options** button to select the Printer and then select **Preview** to view your selected reports before printing.



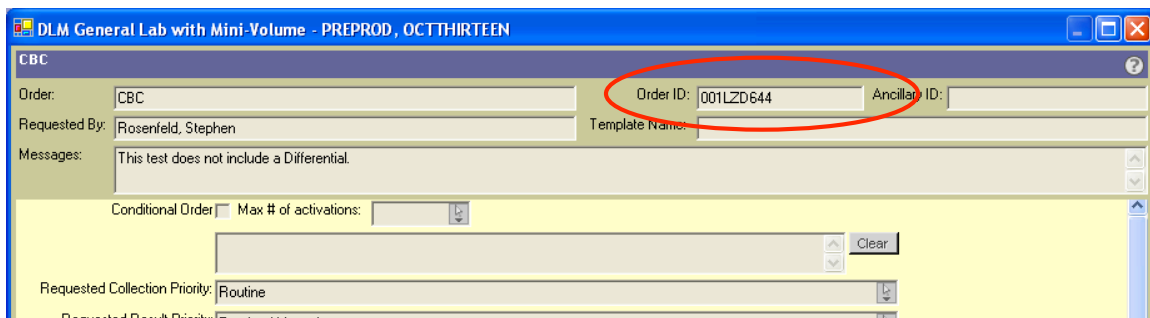
14.11: Preview of Selected Documents Report

Reprint Order Requisitions

You can reprint orders or specimen labels that have already been submitted to your department or for your patient. You may want to do this, for example, if the printer jammed or if the order request or specimen label was misplaced.

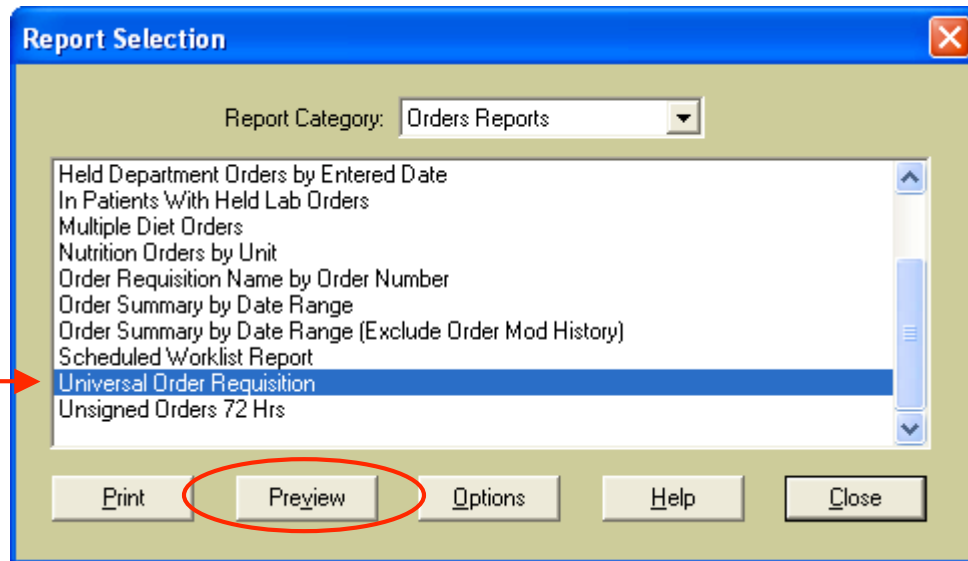
1. Determine the **Order ID** number. Double click on the order from the orders tab to view order details. The order number is found in the upper right corner. Copy the order number and close the window.

Note: To copy the **Order ID**, click on the left mouse button and drag over the number to highlight. Press the **Ctrl + C** buttons on your keyboard – this will copy and hold the number for placement on the **Universal Order Requisition** for later (step 6).

The screenshot shows a software window titled "DLM General Lab with Mini-Volume - PREPROD, OCTTHIRTEEN". Inside, there's a form with several fields. The "Order ID" field, containing the value "001LZD644", is circled in red. Other visible fields include "Order:" with value "CBC", "Requested By:" with value "Rosenfeld, Stephen", "Messages:" with text "This test does not include a Differential.", "Conditional Order" checkbox, "Max # of activations:" dropdown, "Requested Collection Priority:" with value "Routine", and "Requested Result Priority:".

Screen 14.12: Order Number

2. Select the printer icon at the top of the screen.
3. Select the **Orders Reports** Report Category.
4. Select **Universal Order Requisition**.

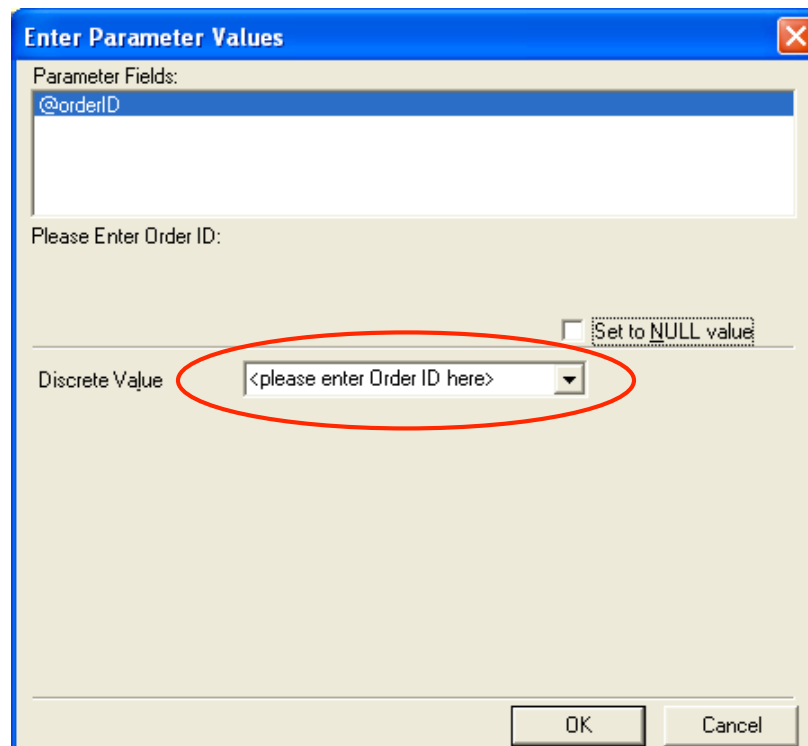


Screen 14.13: Report Selection

5. Select **Preview**.

6. Enter the **Order ID Number** in the **Discrete Value** field.

Note: If you used **Ctrl + C** to copy the **Order ID**, now click on the **Discrete Value** box and press **Ctrl + V** on your keyboard to paste the number.



Screen 14.14: Discrete Value

7. Select **OK**. The requisition displays.

11/18/2005 14:10 National Institutes of Health Universal Order Requisition
Page 1 of 1 Clinical Center

PREPROD, OCTTHIRTEEN	Birth Date: 02/16/1945	40-77-52-0
Female	Age: 60y	Admit Date: 10/13/2005
Attending: Rosenfeld, Stephen	Visit Reason: 2000-D-0183	CRC-1NW

Allergies		Entered Date:
Drug	vitamin A	11/15/05 12:00
Drug	naproxen	11/15/05 11:59
Drug	amphotericin B	11/15/05 11:58
Drug	adenosine	11/15/05 11:45
Drug	acetaminophen	11/7/05 16:25
Drug	acetaminophen	11/7/05 16:25

Order Status History		Status Change Date:
Pending Collection		11/8/05 11:36
Pending Collection	<Session: >Today Outpt/Current Inpt,*Auto Activate.	11/8/05 10:28

CBC	001LZD644
------------	------------------

Requested Collection Priority: Routine
Requested Result Priority: Routine (4 hours)
Collect Specimen On: 11/08/2005
Alternate Printing Note: Specimen collection and label printing will occur at the patient's registered clinic/unit location at the time the specimen is due to be drawn. If you want specimen collection and label printing to occur elsewhere, indicate location in the field below.
Blinded: NO

Requested by/Entered by: Rosenfeld, Stephen/DCRI, Nurse
11/8/05 10:28

Requested DTM: 11/8/05 10:28
Stop Date: N/A

Screen 14.15: Order Requisition Name Report

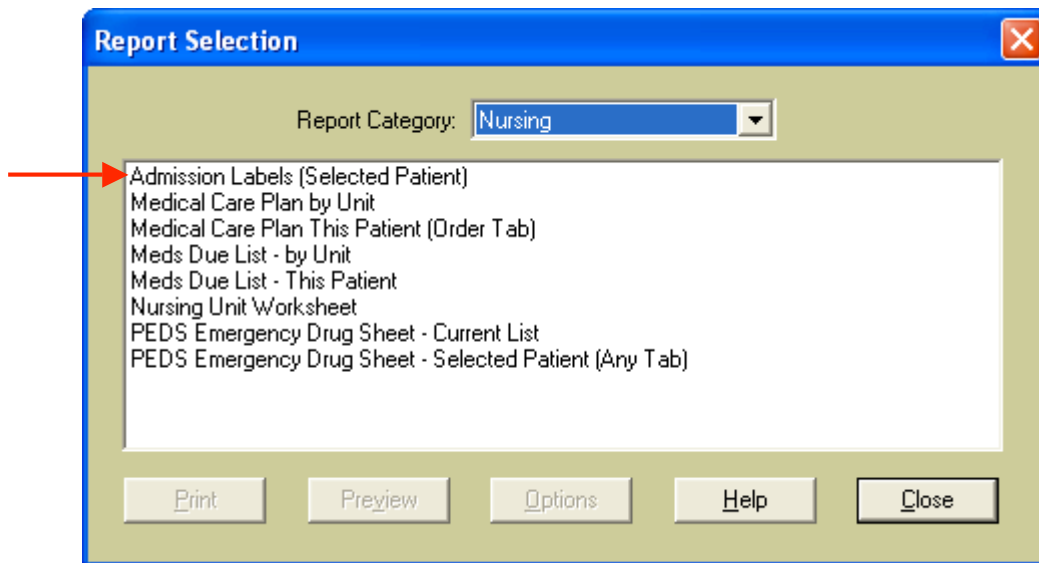
8. Click the Printer icon at the top of the screen and the Print dialog window displays. Click OK.

Print Admissions Labels

You can print Admissions labels as needed from CRIS. Use these labels when no bar-coded specimen labels are available.

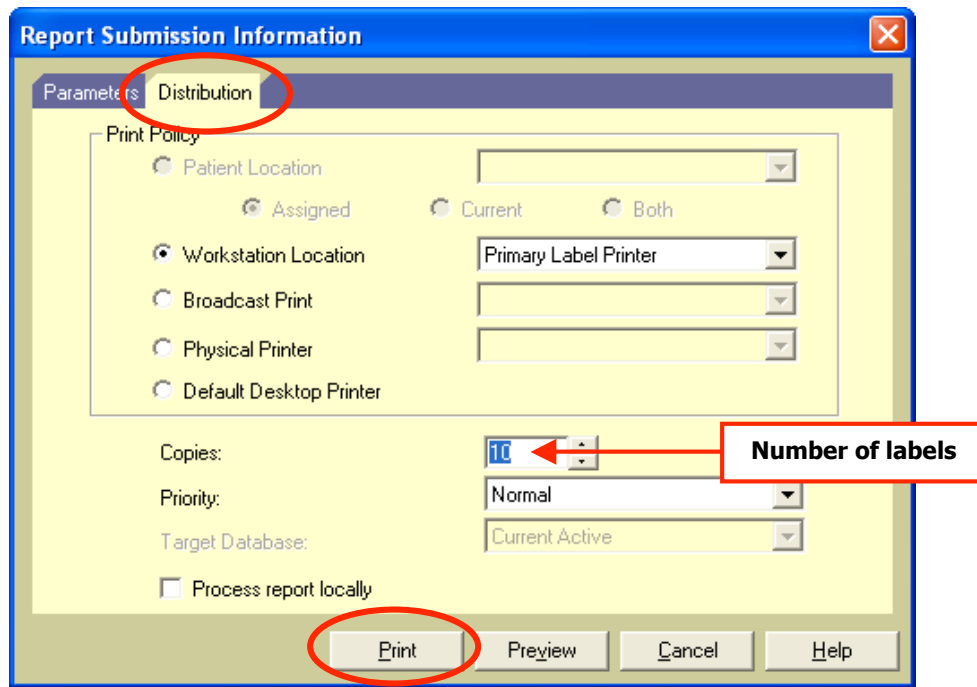
To print admissions labels:

1. From the Report Category field, select Nursing



Screen 14.16: Documents Report Selection

2. Select **Admission Labels (Selected Patient)**
3. Under **Options**
 - There are no Parameters to select for this report
 - Under the **Distribution** tab, select the printer - verify the right printer is selected. The system defaults to the primary label printer for the patient location. Select the number of copies (labels) you want
4. Select **Print**



Screen 14.17: Distribution